

## 029 - PUBLIC ADMINISTRATOR/PUBLIC GUARDIAN

### Operational Summary

#### Mission:

The Public Administrator/Public Guardian Department is committed, when no alternatives exist, to protect, assist, and manage the affairs of decedents and those unable to care for themselves.

#### Strategic Goals:

- Provide timely and effective administration of estates and protect persons unable to manage their own affairs.
- Advance management strategies that support department core functions and prepare for succession planning as a result of future retirements.

#### Key Outcome Indicators:

Performance Measure	2004 Business Plan	2005 Business Plan	
	Results	Target	How are we doing?
<b>THE PERCENT OF ESTATES/ CONSERVATORSHIPS COMPLETED WITHOUT SURCHARGE.</b> <b>What:</b> A measurement to provide timely & appropriate case admin for conservatorships & decedent estates. <b>Why:</b> To measure the goal accomplished, the Court levies surcharges for untimely/improper estates admin.	N/A	The percent of estates/ conservatorships completed without surcharge.	N/A
<b>INVESTIGATE &amp; ADMIN 1800 CASES &amp; COMPLETE 90% OF CONSERVATORSHIP REPORTS 2 DAYS BEFORE HEARING.</b> <b>What:</b> A measurement to meet our legally mandated functions regarding conservatorship investigations. <b>Why:</b> It measures the degree to which the goal is being accomplished.	N/A	Provide investigation & case admin to 1800 Public Guardian cases. Complete 90% of conservatorship court reports in 2 working days before hearing dates.	N/A
<b>PROVIDE TRAINING AND CAREER ADVANCEMENT OPPORTUNITIES TO STAFF.</b> <b>What:</b> A measurement to develop training through the use of the PA/PG training committee. <b>Why:</b> Measures the degree to which staff is provided training allowing PAPG to meet its strategic goal.	N/A	Provide training and career advancement opportunities to staff.	N/A

## Public Administrator/Public Guardian - PUBLIC ADMINISTRATOR/PUBLIC GUARDIAN:

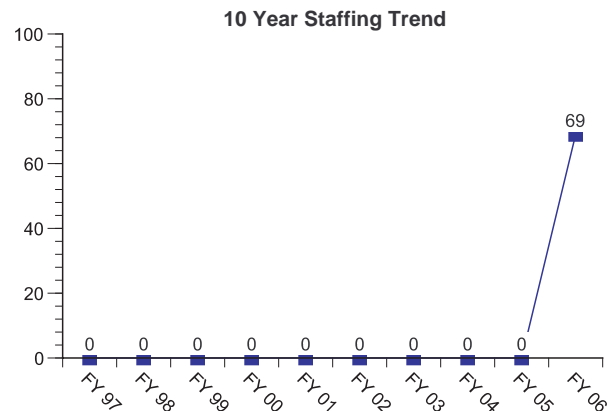
The Public Administrator (PA) protects the assets and manages the affairs of deceased residents of Orange County, who at the time of death left no known heirs, no will, no named executor or an executor who is eligible or unwilling to act.

The Public Guardian (PG) LPS is the designated County Conservator Investigator for mental health conservatorships. The PG LPS unit can serve as conservator for those individuals determined by the court to be gravely disabled as a result of their mental disorder when there is no one else to serve in that capacity.

The Public Guardian (PG) Probate investigates and administers conservatorships for those individuals unable to handle their own finances or care for themselves or are a victim of elder abuse.

ADMINISTRATION: Promotes and provides for the fiscal and operational integrity of the Agency through sound management principles and practices, and provides support services to Agency programs. Support services include Financial and Administrative Services, Information Technology, Human Resources.

## Ten Year Staffing Trend:



## Ten Year Staffing Trend Highlights:

- The Public Administrator/Public Guardian was established as a separate department effective July 1, 2005. A total of 69 positions, \$4,586,680 appropriations, \$2,277,246 revenue and \$2,209,434 Net County Cost was rolled into the base budget for PA/PG.

## Budget Summary

### Changes Included in the Base Budget:

Per Board action on May 3, 2005, Public Administrator/Public Guardian will be established as a separate department effective July 1, 2005. The augmentation created and rolled into the base budget includes 69 positions, \$4,586,680 appropriation, \$2,377,246 revenue, and \$2,209,434 Net County Cost.

## Final Budget History:

Sources and Uses	FY 2003-2004	FY 2004-2005	FY 2004-2005	FY 2005-2006	Change from FY 2004-2005	
	Actual Exp/Rev	Budget As of 6/30/05	Actual Exp/Rev <sup>(1)</sup> As of 6/30/05	Final Budget	Actual Amount	Percent
Total Positions	0	0	0	69	69	0.00
Total Revenues	0	0	0	2,377,246	2,377,246	0.00
Total Requirements	0	0	0	4,586,680	4,586,680	0.00
Net County Cost	0	0	0	2,209,434	2,209,434	0.00

(1) Amounts include prior year expenditure and exclude current year encumbrance. Therefore, the totals listed above may not match Total FY 2004-05 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Detailed budget by expense category and by activity is presented for agency: Public Administrator/Public Guardian in the Appendix on page page 491

### Highlights of Key Trends:

- As the population of Orange County ages it is expected that PA/PG will see an increase in referrals for the older adults unable to provide for themselves or who are a victim of elder abuse. A lack of community programs and support systems allowing independent living or protecting older adults from fiduciary abuse and neglect increases the vulnerability of older adults in Orange County. These vulnerable older adults are frequently referred to Public Guardian in order to protect their person and their estates.
- At this time a significant revenue source, Targeted Case Management (TCM) remains intact and a viable source of revenue for the Public Guardian programs. There is action at the federal level to reduce Medicaid funding, through which Targeted Case Management is funded so any reduction or elimination of this funding source would negatively impact the Public Guardian in continuing to meet his fiduciary and mandated responsibilities.

### Budget Units Under Agency Control:

No.	Agency Name	Public Administrator/Public Guardian
029	Public Administrator/Public Guardian	4,586,680
	Total	4,586,680

## 029 - Public Administrator/Public Guardian

### Summary of Final Budget by Revenue and Expense Category:

Revenues/Appropriations	FY 2003-2004		FY 2004-2005		FY 2004-2005		FY 2005-2006		Change from FY 2004-2005	
	Actual Exp/Rev		Budget		Actual Exp/Rev <sup>(1)</sup>		Final Budget		Actual	Percent
Revenue from Use of Money and Property	\$ 0	\$	0	\$	0	\$	561,646	\$	561,646	0.00%
Intergovernmental Revenues	0		0		0		755,000		755,000	0.00
Charges For Services	0		0		0		1,060,600		1,060,600	0.00
<b>Total Revenues</b>	0		0		0		2,377,246		2,377,246	0.00
Salaries & Benefits	0		0		0		5,057,105		5,057,105	0.00
Services & Supplies	0		0		0		754,919		754,919	0.00
Intrafund Transfers	0		0		0		(1,225,344)		(1,225,344)	0.00
<b>Total Requirements</b>	0		0		0		4,586,680		4,586,680	0.00
<b>Net County Cost</b>	\$ 0	\$	0	\$	0	\$	2,209,434	\$	2,209,434	0.00%

(1) Amounts include prior year expenditure and exclude current year encumbrance. Therefore, the totals listed above may not match Total FY 2004-05 Actual Expenditure + Encumbrance included in the "At a Glance" section.